SYSPRO

Simplifying your Success

SYSPRO Point of Sale:
Functionality

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Setup

Branch Setup

- Ability to define which warehouses are valid sale warehouses for the branch
- Payment type definition at branch level
- Default information at branch level such as address, order type and sales person
- Flexibility to allow teller overrides for variances, pricing or setting of discount limits
- Supervisor overrides providing complete control over all functionality
- Card integration with Nomad and Chase devices ✓
- Manage Orders customization ✓
- Ability to define search defaults that will be used throughout the application ✓

Branch Customers

Manage salesperson and geographical area defaults at a branch customer level. This allows defaults per branch customer, so sales person 'A' might be responsible for customer '1' at branch 'East' and 'North' but sales person 'B' is responsible for customer '1' at branch 'West' and 'South'.

Security

SYSPRO Point of Sale has been engineered from the ground up to ensure that it has robust and easily manageable security features, giving you the peace of mind to focus on running the business. Key functionality includes:

- Role and Point of Sale user definition
- Access control per user; role based security management and comprehensive permission security checkpoints
- Role permissions and access can be overridden at a user level
- Ability to configure required supervisor acceptance and override control over all sensitive functional areas
- Critical function and page access per user controls, defined user roles and comprehensive permission security
- Supervisor overriding provide complete control over all functionality.
- Field level security based on role or operator per function per page (e.g. who can see cost or GP% information) ✓

Printing Designer

- Every document printed from the Point of Sale is available to be configured and changed in the report designer

- Any till slip or document can be customized to include logos or customer specific information

Manage Mappings

- Printer mapping management allows printers to be mapped at a document type level per user, allowing documents to print to specified printers depending on the document being printed and the user printing it
- Multiple documents per transaction type. This allows for multiple invoices to be printed depending on warehouse and, or product class on the line. This is for scenarios where goods must be picked from different locations or there are legislative requirements (e.g. in the medical industry, certain schedule drugs can't be printed on the same invoice as normal items)

✓

Manage Inventory

Inventory categories, brands, product classes and image management.

Custom Narratives

✓

Comment groups can be added to SYSPRO Point of Sale and can be selected at the time of sale to add to an order.

Discount Reasons

✓

Custom discount codes and discount reasons at a branch level for store level promotions or discount functionality. These are additional discount reason codes that are defined and controlled in Point of Sale and passed to SYSPRO as a discount percentage or value.

System Management

An off-line transaction management function is available for the system administrator to see how many transactions are still waiting to be copied and posted to head office.

Barcode Management

Comprehensive barcode management is available to allow barcodes to be captured and defined as required. Key features include:

- Capture barcodes and link them to the required stock code and UOM in SYSPRO. If the UOM is not specified, it will prompt the user at the time of scanning the item
- Ability to define multiple stock codes per barcode - in the event that a registered barcode is used, for example on a can of coke, matches a printed unregistered barcode on a packet of fudge, the system will allow both of these to be defined and prompt the user at the time of sale to determine which item is actually being sold
- Ability to define multiple barcodes per stock code to differentiate between UOM etc
- Detailed barcode definition to cater for scales and weight integration.
- Intelligent barcodes allowing the user to specify the stock code, UOM, quantity etc. in the barcode, and auto populate the corresponding fields at the time of sale
- Stock code/supplier cross reference definition to cater for supplier stock codes in the barcode. This allows the supplier barcode to be used and the system will still correctly pick up the stock code being sold
- Barcode Serial Linkage - Ability to set up serial numbers as the barcode to enable scanning to automatically pick up the correct stock code and serial number at the time of scanning during sales ✓

Configurable Fields ✓

The intention of the configurable fields is to allow the user to configure what fields they would like to use at various points in the product. Currently this is only functional in the customer and contact creation and maintenance. The intention is to introduce this into other areas of the product in the future, but for the time being it is contained to customer and contact creation and maintenance.

The configurable fields enables the following functionality:

- Ability to customize the screen layout
- Ability to specify require or mandatory fields
- Ability to define the grouping or order of fields
- Ability to add custom validation to fields
- Ability to define custom fields applicable only to Point of Sale

Ability to define custom Point of Sale fields and link them to a custom form field in SYSPRO.

Store
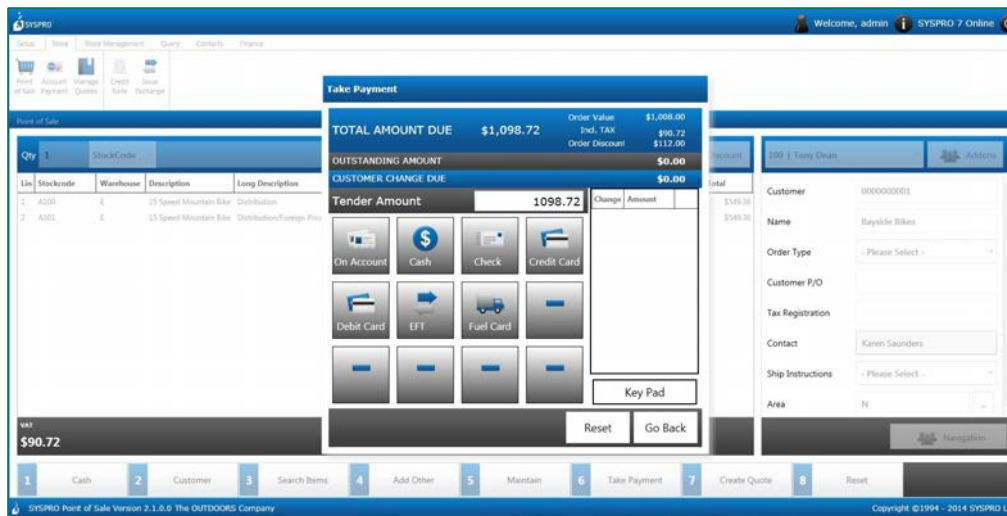
The Point of Sale screen is designed to cater for over the counter Cash & Carry environments. Items are scanned, totalled, payment is taken and till slip is printed. Some of the key features are listed below:

- Full touch enabled and mouse-driven input
- Mobile tellers who are not restricted to a single till. Operator cash-ups are done by operator and not by till which means tellers can login to any till point
- Barcode scanning and cash drawer integration
- Split payments between cash, check, card etc.
- Cash or account based sales
- Multiple transaction types – stocked and non-stocked sales; miscellaneous, freight and service charges; comment line processing
- Create, confirm and compare quotes
- Comprehensive stock search via search window or catalog/category browsing
- Stock traceability and the option to sell serialized or lot-traceable items.
- Administrator-level access to reporting and management functions from anywhere using any device that can run Silverlight, with an Internet connection
- The touch screen capability and bar-code scanning functionality provide for an efficient, streamlined customer experience
- Track sales of traceable or serialized items
- Full touch enabled and mouse-driven input
- Mobile tellers who are not restricted to a single till. Operator cash-ups are done by operator and not by till which means tellers can login to any till point
- After the event order maintenance and payment receipts are enabled. Orders can be placed and edited at a later stage. Payments can also be taken as required after order creation when maintaining an order

- In-store account customer credit limit override. This enables the branch manager to allow an account customer to go over their credit limit (as defined in SYSPRO) in certain circumstances. The Point of Sale streamlines this process as it follows the normal payment process. It will detect if the credit limit has been exceeded and prompt for supervisor authorization. If approved the transaction will complete. In the background, the Point of Sale creates an order in suspense, releases it using the credit authority setup, invoices it and processes the payment. This all happens automatically when supervisor authorization is given and there is no manual process of releasing the order and then changing the status to invoice
- A minimum price margin can be set-up which will be checked when operators are applying a discount. If the margin is 10% (i.e. cost + 10% is the lowest anything can be sold) the operator will not be allowed to discount below this percentage
- Order discounts - an order discount can be given which will calculate and apply a discount for each line
- Complex pricing as set-up in SYSPRO (customer contract pricing, price codes, price code category structures per customer)
- Credit limit and terms integrity as defined in SYSPRO
- Optional payment comments. A branch option allows any payments made to be saved against the SYSPRO Sales Order and Invoice as comment lines.   ✓
- TPM (see detailed information under 'General System functions' later in the document)   ✓
- Automatic bin depletion   ✓
- Custom discount codes and discount reasons at a branch level for store level promotions or discount functionality. These are additional discount reason codes that are defined and controlled in Point of Sale and passed to SYSPRO as a discount percentage or value   ✓
- Serial browse access control to force users to scan serials and not just select the first random serial. The supervisor can override and allow the browse if required   ✓
- Permission control allowed line types (i.e. non-stocked, miscellaneous etc.)   ✓
- Unit price overrides   ✓

Account Payments

This enables account customers to make account payments in store. It will make a payment against the customer account in SYSPRO. Account payments cannot be made against sub accounts. Account payments can be made in an off-line and online environment. If the store communications are down, the account payment will only reflect at head-office and other branches once the lines are back up.

- There is a branch setting that allows you to configure whether or not you want the account payment to be an unallocated payment on the debtor account or if you want it to automatically pay the oldest invoices first   ✓

Quotes

This allows you to create, compare and confirm quotes. There is a quote expiry option that allows you to specify in days how long the quote is valid for. The customer may return at any stage in the specified time period to confirm the quote. Payment can be processed directly from the quote screen and the system will automatically generate the sales order and invoice, process the payment and print the till slip. A customer will not be able to confirm an expired quotation. This is a fast track way to convert a quote to a sales order and take payment simultaneously.

Credit notes

This allows you to process credit notes for existing invoices or till slips for both cash and account based customers. It will credit the stock accordingly and refund the payment, either back onto the customer account or as cash, credit card, debit card etc.

Payment type set-up has been modified to allow refund rules to either always refund only account or cash etc. or only allow refund of the original payment type.

✓

Exchanges

✓
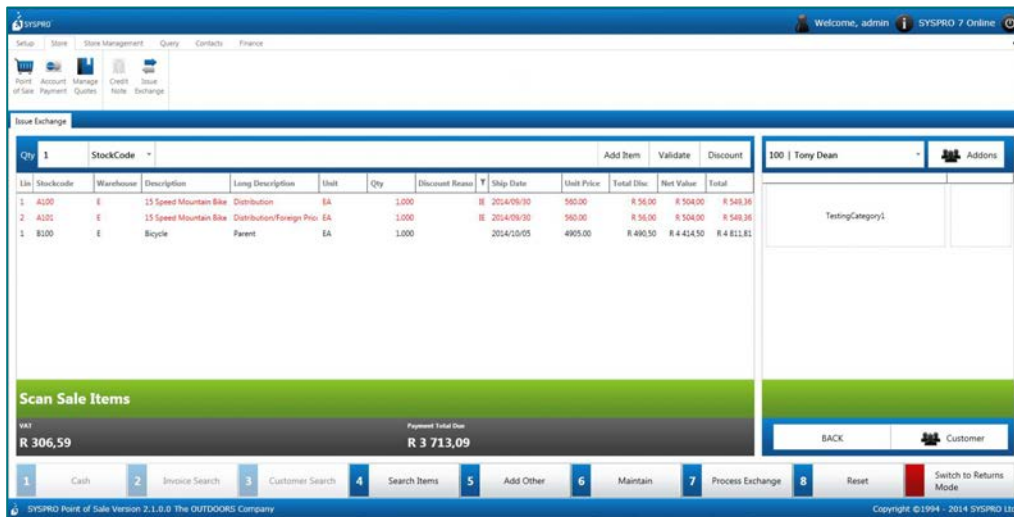
This functionality allows you to exchange items. It will allow the user to scan in the items they are bringing back and then scan in the new items they are taking. It will automatically calculate if a refund or pay-in is due. Behind the scenes, the appropriate transactions are calculated automatically (credit notes, credit note invoice, refunds, sales orders, invoices and payments).

Store Management

Manage Orders

Manage Orders is designed for a more complex Point of Sale environment that requires order maintenance or partial invoicing. This is also useful for sales reps on the road who want to maintain or query orders on-site with a customer. Key features of the order maintenance are:

- Online only
- All features mentioned above in Point of Sale
- Order maintenance
- Partial invoicing and partial payments
- Back order management
- Allows the operator to change the Sales Order status
- Customer and contact information
- Multiple ship-to-address selection
- Credit status information
- Shows invoices and payments already processed against the order
- View of all open orders for the specified customer
- Stock line detail information is displayed
- Deposit payments - the ability to take multiple deposit payments against an order based on deposit rules set-up in the Point of Sale ✓
- Ability to define rules around order maintenance and invoicing. In the event that an operator is not allowed to invoice, the operator will be able to take deposit payments in full and when the factory is ready to invoice, they can invoice the order upon delivery ✓
- Lay-Bye Sales ✓
- Optional payment comments. A branch option allows any payments made to be saved against the SYSPRO Sales Order and Invoice as comment lines ✓
- Customer order comments with SMS integration. Point of Sale operators can comment on an order and send it via an SMS to a customer ✓
- TPM ✓

- Automatic bin depletion ✓
- Custom discount codes and discount reasons at a branch level for store level promotions or discount functionality ✓
- Job Query tab to check progress of made in item in the factory ✓
- Allow dispatch notes to be printed before invoicing or with the invoice if required ✓
- Serial browse access control to force users to scan serials and not just select the first random serial. The supervisor can override and allow the browse if required ✓
- Permission control allowed line types (i.e. non-stocked, miscellaneous etc.) ✓
- Pick slips print from order maintenance to allow order to be picked before payment is made. The pick slip will print out the order with all ship lines. This will take bins into account ✓
- Printing to warehouse – Ability to print a delivery note, pick slip and proof of delivery to a specified printer based on the warehouse on the line of the invoice ✓
- Dispatch orders can be processed ✓

Re-Print Invoices

This allows for re-print of Invoices and can be supervisor controlled to avoid operator fraud. If an invoice needs to be reprinted, the manager can enter the relevant branch or SYSPRO Invoice number and select to reprint the document.

Petty Cash Management ✓

The Petty Cash program provides new functionality to keep track of cash going in and out of the till for internal use. Petty cash types will be set-up in the Point of

Sale (i.e. cleaning, staff lunch, sundries etc.) and linked to the relevant GL code in SYSPRO. When petty cash is taken from a till, the amount and petty cash type must be selected and posted. This will be incorporated and taken into account in cash-ups during the End-of-Day (EOD) to factor in cash taken from the tills.

Manage SCTs

Supply Chain Transfers are used to transfer stock between branches. Typically a Point of Sale store will request stock from a central location or a branch located nearby. Source locations are controlled at a store level in the branch set-up where you can define what branches a specific store is able to source stock from. The following functionality is available:

- Generate new Supply Chain Transfers or edit existing Supply Chain Transfers
- Invoice SCTs which generates GIT reference and transfer documentation to be sent with the stock to the store
- Manage back orders
- Cancel SCTs

Warehouse Transfers   ✓

A warehouse transfer facility has been provided to allow the movement and control of stock between the store room and the retail floor. These are not always separate warehouses but when they are, this will allow the store manager to control this accordingly.

Receive GITs

This allows the store to receipt in the Goods In Transit generated by the SCT when the SCT was invoiced. When the store processes the GIT reference, the stock will be adjusted accordingly at the branch processing the receipt. The program allows you to receipt multiple GIT references at the same time so if multiple GIT references arrive together, they can be processed together in a single review. Key functionality available:

- Filter references by create date or due date
- Automatically select all outstanding GIT references to be processed
- Print a list of all references and items being receipted
- Return stock
- Partially receipt while waiting for stock
- Batch receipt of multiple references
- GIT over receipts   ✓

Manage Transactions

Due to the nature of Point of Sale environments, if a customer is at the till with an item they want to purchase, the sale must happen seamlessly and quickly to get the goods sold and the customer out the door happy. If there are system issues (i.e. stock issues or shortages), the Point of Sale will not prevent the sale from happening. The payment will still be taken and the till slip printed but if something failed in the processes of posting to SYSPRO it needs to be caught and processed accordingly. The Manage Transaction program has been designed for this reason. If anything happens during the sale, the operator and customer will be able to continue as normal and the transaction will be caught by the transaction review. This will allow you to sort out any system issues and re-post the transactions to SYSPRO. The transaction review will show the error message to the administrator. Once the error has been corrected, the administrator can select to repost the transaction which will pick up from the last successful point in the transaction. If required, the administrator also has the ability to change any data against the transaction.

Stock Take ✓

Integration from to the SYSPRO Stock Take module has been added to SYSPRO Point of Sale. The stock take will be initiated by a manager in SYSPRO.

Once the stock take has been initiated, a stock take review can be run in Point of Sale showing all items in stock take including quantities, variances and captured quantities. A capture sheet can be printed from here. Once stock has been counted, the operators can capture this through the stock take capture program and post the values to SYSPRO. Once all the stock has been counted, the manager can finalize the stock take from SYSPRO.

Query

Movement Queries

A detailed inventory movement function is now available. This allows you to query movements based on a customer code and date range. It will return all movements against the customer so you can search for a specific invoice number by stock code or date.

Invoice and Payments Queries

A details Invoices & payments query is also available (this was available in Version 1.0, but now also has the re-print facility). This is driven by customer code and will allow you to view all invoice and payment details for a specific customer. Where applicable, it will also allow you to re-print any credit note or invoice documents. This is particularly useful when a customer does not have the original invoice with them and wish to return an item.

Customer Query

Allows in-store customer queries for all customers in the SYSPRO company. The query will return the following key information:
- Customer details (name, address, etc.)
- Contact information
- Management notes
- Credit limit information
- Aging information
- Credit balances
- Order information (last order date, last payment date etc.)
- Customer stock movements (invoices, credit notes etc.)
- Invoices and payments showing outstanding balances

Stock Query

Allows in-store stock queries. It shows stock levels across all warehouses allowing stores to see stock at other locations. The query will return the following key information:
- General stock information
- Stock pricing and tax information
- List of warehouses detailing the following:
  - Available quantity ⏐ Unallocated quantity ⏐ On Hand quantity ⏐ In transit ⏐ In inspection ⏐ On order
  - Allocated to Sales Order
- A details query per warehouse is available which provides the following per warehouse:
  - List of active purchase orders for the stock code in the warehouse
  - List of active sales orders for the stock code in the warehouse
  - Stock movements for the warehouse
  - Lot, bin and serial queries   ✓

There is also a Customer Movements and Invoices and Payments Query which allows you to query detailed movements.

Contacts

Contact Maintenance

Allow addition and maintenance of SYSPRO contacts.

Customer Maintenance ✓

There is a branch option to prompt for customer/contact creation before every order. This can also be set to 'enforced' to ensure contacts are created. The Point of Sale will also do a cross reference on certain key fields to prevent duplicate contact or customer creation. Customer defaults can also be set against the branch to make customer creation easier.

You can also maintain a customer from the customer maintenance screen in the Contacts menu.

Manage cards

Allows customer cards to be captured into the Point of Sale system. This allows the card to be captured and linked to an existing SYSPRO customer and, or contact. The following functionality is available:

- Add/Edit card
- Link to customer/Contact
- Set Status to Active/Inactive or cancelled
- Apply a transaction limit - if this limit is set, the customer will not be able to transact for more than the limit set here for each transaction done on the card

Allocate cards

This allows all functionality mentioned above except for adding or editing cards on the system. This will typically be used by someone who does not have permissions to add cards. If a customer logs onto the system, they will only be able to see cards allocated to their account, and assign contacts and transaction limits to each card.

Finance

Comprehensive cash-up and EOD processing as per training manual. Key features include:

Supervisor Cash-Up

- Advanced cash-up functionality with cash book integration
- Supervisor controlled cash-ups
- The ability to cash-up to a point in time - allowing operators to continue trading while supervisor cash-ups take place. This caters for drop safe scenarios if they want to drop money into the drop box safe at certain intervals during the day
- Allow for multiple cash-ups per operator for cash drops in the day
- Add transactions after a cash-up has started
- Till cash-up - enhanced to allow a cash up for multiple operators to cater for a till environment where there are multiple operators operating the same till   ✓
- Cash-up notes to capture notes about shortages or surpluses. These are saved against the cash-up and can be used to report on if required   ✓

Select	Date	Transaction Type	BranchSalesOrder Desc	Syspro Sales Order	Customer	Customer Name	User Name	Total Payment
■	2014-09-29 15:29	Online Invoice	RRA000045	000902	0000005	Cash Sales	Vivienne	200.00
■	2014-09-29 15:30	Online Invoice	RRA000046	000903	0000005	Cash Sales	Vivienne	100.00
☐	2014-10-03 11:42	Online Invoice	RRA000047	000904	0000005	Cash Sales	Vivienne	4940.00
☐	2014-10-03 11:43	Online Invoice	RRA000048	000905	0000005	Cash Sales	Vivienne	1800.00
☐	2014-10-03 15:16	Online Invoice	RRA000050	000906	0000005	Cash Sales	Vivienne	1888.98

Select User Transactions For Cash Up

Print Payments   OK   Cancel

End of Day
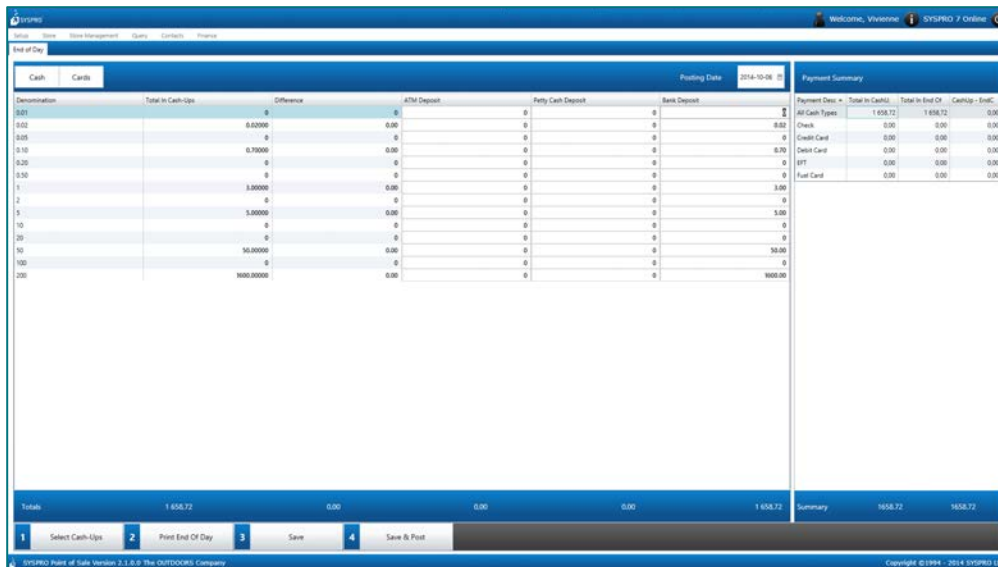
- Group selected cash-ups in EOD to allow easy reconciliation between cash book and bank statement
- EOD posts entries grouped by payment types defined. Option to group check payments with Cash
- Can save a cash up or EOD at any stage and continue processing at a later stage
- Petty cash management
- EOD reporting
- Sales and payment reports
- Detailed EOD variance reporting to help manage shortages and recon to the transaction bank in SYSPRO ✓
- Payment groupings in EOD to manage custom groupings according to banking ✓
- Option to manage under/over variances at payment type level instead of branch level. A variance GL can be defined at payment type level ✓

General System Functions

SMS Integration

SYSPRO Point of Sale has been integrated to a text messaging company called Bulksms.com. If you have an account with them, you will be able to send text notifications and, or approvals to customers at various stages in the sales process. These include:

- Notification of sale on the customer account
- Authorization to purchase on account
- Customer notes notifications can be sent from the sales order at any stage if the sales rep wishes to communicate with the client via SMS

✓

TRA Fiscal Printing

See associated document on the SYSPRO Support Zone.

USA Tax

SYSPRO Point of Sale integrates seamlessly with SYSPRO tax which includes extended tax codes used in the USA. The Point of Sale has been adapted to extend this as follows:

- A default ship address can be defined at branch level and defaulted for every sale. This is because typically in retail, the tax that needs to be applied is tax calculated based on the locations it is being sold. This options allows tax to be calculated based on the State, County, City combination of the actual store. If items are going to be shipped to the customer, the ship address can be changed at the time of sale and tax will be calculated accordingly

SYSPRO Point of Sale will automatically pick up if tax is calculated at line level or order level according to your SYSPRO set-up. You can however elect to display tax as lines are being added to give an indication even if tax is set to calculate at order level.

SYSPRO Point of Sale also has the option to integrate with the 3rd. party tax system AVALARA. The SYSPRO business objects will call out to the 3rd. party tax system as in core SYSPRO. Point of Sale provides the facility to select that you would like to integrate. This is only available for online branches as the callout requires an internet connection to calculate the tax and bring back the required values. Investigations have been done with regards to taking this off-line and if required, this functionality can be built.

Canadian GST & PST

SYSPRO Point of Sale will correctly apply GST and PST based on country code and tax settings defined in core SYSPRO.

Deposits

✓

Deposits can be set up in the Point of Sale based on a number of criteria. At a branch level you can select to enable or enforce deposits based on part category or warehouse. Deposit percentages can be defined at a branch level allowing the customer to set required deposit percentages according to business rules. Deposits are tracked at an order level. Deposit comments are saved against the order for every deposit taken. Deposits are taken as a miscellaneous payment against the customer account using a deposit branch for the payment, allowing financial reporting on customer balances and deposits taken, but all still tracked correctly against the debtor account in SYSPRO. When an order is invoiced, the deposit amounts are re-allocated and used to pay the invoice as normal.

Lay-byes

✓

Deposit orders can be used to cater for lay-byes.

TPM

✓

SYSPRO Point of Sale integrates to the SYSPRO Trade Promotions module and caters for all the standard promotions that are define in SYSPRO. Please note that this does not include TPM Pricing.

Customer Loyalty

Customer loyalty programs are extensive and there are companies specializing in the management of customer loyalty.

Gift Vouchers

SYSPRO Point of Sale caters for Gift Vouchers by managing them as a payment type. As with loyalty, there are companies that specialize in Gift Card and Voucher management. By using Vouchers as a payment type, you will be able to financially account, report and recon Gift Voucher payments in conjunction with the 3rd. party Gift Voucher Management System.

Functionality Comparison

Functionality	Version 1	Version 2.1
The capturing of sale and related data is done at the time and place of sale	✓	✓
Customer/contact creation before every order		✓
Accepts payments or deposits		✓
Enables immediate stock allocation	✓	✓
Handle credit notes and refunds	✓	✓
Defined user roles and comprehensive permission security	✓	✓
Control over tellers for prices, discounts	✓	✓
Can sell serialized or lot-traceable items with warranty tracking	✓	✓
Specify default unit of measure to use when entering orders	✓	✓
Split payments between cash, check, card and vouchers	✓	✓
Custom discount codes and discount reasons at a branch level for store level promotions or discount functionality		✓
Transfer and receive stock between branches	✓	✓
Permission control allowed line types (i.e. non-stocked, miscellaneous etc.)		✓
Post a payment without allocating it to an invoice		✓
Reserves stock	✓	✓
Simplified user interface for retail environment	✓	✓
Provides off-line trading should network or server go down	✓	✓
Optimized Web interface to reduce network traffic, and allow access from anywhere with an Internet connection	✓	✓
Tellers not restricted to a single till		✓
Create quotes	✓	✓
Handle stock returns, and exchanges		✓
Multiple printers can be defined per user, per function, per report type	✓	✓

Multiple documents per transaction type - allows for multiple invoices to be printed depending on warehouse and, or product class on the line		✔
Cash-up functionality	✔	✔
Petty cash management		✔
Goods not in stock can be ordered, and customer advised when the goods come in	✔	✔
Optional payment comments. A branch option allows any payments made to be saved against the SYSPRO Sales Order and Invoice as comment lines		✔
Customer order comments with SMS integration. Point of Sale operators can comment on an order and send it via an SMS to a customer		✔
Printing to warehouse – Ability to print a delivery note, pick slip and proof of delivery to a specified printer based on the warehouse on the line of the invoice		✔
Stock Take capture		✔
Customer Cards	✔	✔
SMS integration	✔	✔
Barcoding	✔	✔
Gift Vouchers		✔
Allows for tracking deposits and payments against sales orders		✔
Handles layaways/lay-byes		✔
TPM		✔

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